

Steelhead Recovery Team
September 23, 2014 Meeting Summary
9:30 am – 3:00 pm

Decisions and Actions from Meeting

Decision	Comments
1. Accepted July 23 and August 28 Recovery Team meeting summaries with no edits.	Agreement by all members present
2. Agreed to move forward using Open Standards for the recovery planning process.	Agreement by all members present
3. Agreed to have Elizabeth Babcock verbally update the Puget Sound Salmon Recovery Council about the Recovery Team's advice on watersheds moving forward now; also agreed to revise the letter and circulate via email.	Agreement by all members present
4. Hold November 14 th as next Recovery Team meeting until confirmed or changed.	

Action	Assignment
1. Share more information on the central California steelhead and coho recovery plans and how they used Open Standards and Miradi.	Susan O'Neil
2. Check how long the November 14 th Salmon Recovery Council Executive Team meeting will be and if it will be at the Partnership (could be partnered with the November meeting for the steelhead Recovery Team).	Jeanette Dorner
3. Update the letter to the Recovery Council; circulate to the Recovery Team via email for comments.	Elizabeth Babcock & Claire Turpel
4. Meet before next Recovery Team meeting to continue progress.	Each Workgroup
5. Confirm next Recovery Team meeting.	Elizabeth Babcock
6. Submit travel reimbursements if desired (for non-NOAA employees).	Recovery Team members

Welcome and Introductions

Elizabeth Babcock welcomed members of the Puget Sound Steelhead Recovery Team (Recovery Team) to the fifth meeting (*see end for list of attendees*). The main purpose for this meeting was for the Recovery Team to make a decision about whether or not to use Open Standards for the planning process. There were no changes to the draft agenda.

- NOAA has contracted with Triangle Associates to facilitate and support the Recovery Team effort. Additionally, Alison Agness has accepted a 120-day detail with NOAA's Sustainable Fisheries Division, so will not be working with the Recovery Team during that period. In her absence, Claire Turpel from Triangle will fulfill many of her project management and administration duties, and both Claire and Bob Wheeler will work with the Recovery Team to facilitate progress moving forward.

- David Price from the Washington Department of Fish & Wildlife (WDFW) will be working with the Recovery Team instead of Jeff Davis. David was involved with developing the first steelhead recovery plan in the lower Columbia, and was involved with the Puget Sound Steelhead Technical Recovery Team (TRT).

July 23 and August 28 Meeting Summaries

Since the first Recovery Team meeting, NOAA has been posting agendas for each meeting but not the meeting summaries as there has not been an agreed-upon approval process. The Recovery Team discussed at a previous meeting whether or not to post the meeting summaries, and they agreed to do so as long as there is a review/acceptance process. At each meeting, the Recovery Team will review the previous meeting's summary, and edit if necessary and work to accept the summary. Acceptance means everyone can "live with" the summary language and the summary does not misrepresent a position or what was stated at the meeting; once the Recovery Team accepts the summary it will be posted online.

With that explanation, the Recovery Team reviewed the July 23 and August 28, 2014 draft meeting summaries. There were no edits to either summary and both were accepted.

Open Standards Presentations

Several members presented to the Recovery Team about Open Standards, how it has been used in other recovery planning processes, and why it could help in this recovery planning process. Highlights from each presentation, plus discussion points, are included below.

Open Standards for Steelhead Recovery Team

Ken Currens highlighted the steps of the Open Standards process, and explained in greater detail the first two steps (1 – Conceptualize, and 2 – Plan Actions and Monitoring). Points and discussion included:

- History: Open Standards came from The Nature Conservancy, which developed the process to have a consistent way to plan and prioritize work on their nature reserves. Since its inception, Open Standards has been widely used in other recovery/conservation planning processes as a tool for adaptive management.
- Step 1.1 – Define the Project Team
 - Think about roles, responsibilities, and communication between the team members.
 - As people's roles are further removed from the internal team, the communication to/from them changes.
- Step 1.2 – Define Project Scope & Vision
 - Scope usually refers to a geographic area, and the vision uses a narrative.
 - The Recovery Team is still ironing out what are the scope and vision for this steelhead recovery effort.
- Step 1.3 – Identify Focal Ecosystem Components
 - Need to be strategic to narrow down what the focus is.
 - The number of Key Ecological Attributes (KEAs) could and arguably should be limited to a manageable number. It might make sense for the Recovery Team to develop criteria for why certain KEAs are chosen, such as those KEAs that are "limiting" the population.
 - There are different routes one can take to get to the same outcome of ecosystem components, just depends upon the lens used.

- The species-areas curve helps identify how much of the habitat to focus on for a percentage of the population, plus biodiversity.
 - The Recovery Team discussed the potential to focus on geographic reaches and using geography as a prioritizing factor.
- Step 1.4 – Complete Viability Analysis for Focal Components
 - This becomes goal setting, but the Recovery Team may do this piece differently because of what they could learn from the life cycle modeling effort.
 - This step asks to look at the current health and then set measurable targets for how to improve from that.
 - There is likely a policy-level input at this step to decide what natural background rate to use (i.e., use the historic rate or a more recent rate that shows the “new normal”). Policy makers can also be involved in setting the desired future targets.
 - If data is unavailable, modeling can help.
 - There are four categories to rate a population: poor (going to extinction without drastic measures); fair (outside the acceptable range of variation and requires human intervention to maintain/improve); good (within acceptable range of variation and requires human intervention to maintain/improve); and very good (requires little maintenance).
- Step 1.5 – Threats Assessment
 - This is prioritization of the threats.
 - Stressors are things that changed KEAs, stressors are the mechanism that causes the stress, and pressures are where the stressor comes from. An example is: stressor = silt in streams; stress = low embryo survival in redds; pressure = logging.
 - The Open Standards rating of threats includes scope, severity, and irreversibility.
 - This is hard to get right because the scale and timeframe are arbitrary.
 - The Recovery Team noted that these ratings should be transparent, and that they could use what the Puget Sound Partnership (PSP) is completing for their pressure assessment.
- Step 1.6 – Summarize Situation Analysis
 - A summary of what data has been gathered to date and analyses produced.
- Step 2 – Plan Actions and Monitoring
 - From the summary of data and analyses, there is a way to identify the actions and monitoring you wish to focus on. The first step is to identify strategies to change the situation, then identify a strategy chain on which to focus, and then develop a “results chain”. The results chain is not a workplan but should identify actions to take that pertain to certain strategies.
- Each objective could have an indicator, which could also have associated status and trends.
- Modeling results, testable numbers, and other quantitative information can be plugged into the results chains. Open Standards was designed for people without much data, but when there is data, the system can incorporate it. There are approaches that can help provide the technical basis for decision-making, and Open Standards helps us display that information to the public and others.
- One member asked how the method would help local watersheds allocate resources. The hope is that Open Standards would help identify those in steps 3, 4, and 5.
- The Recovery Team discussed the steelhead recovery planning process compared to the Puget Sound Chinook recovery planning process, where each watershed came up with individual

chapters and then those were blended together. The steelhead process will be different because it is starting with a regional (DPS and MPG level) plan. A member noted that there should be points along the process to think about how the regional work relates to the watersheds.

- A member noted that the regional plan will not be specific enough to drive actions in specific watersheds. The regional plan will have enough information that can be useful to watersheds, but there will be a need for more specific action planning in each watershed, which could be helped by EDT modeling.
- If the Recovery Team adopts Open Standards, they agreed there will be a future discussion about who from the team would be managing the effort and corresponding software.

Communicating Open Standards

Susan O'Neil presented examples of existing recovery plans that used an Open Standards approach and how the information is communicated/displayed. She described some details about Miradi, the software that accompanies Open Standards to demonstrate where technical information is incorporated, how it is displayed, and where to cite sources/methods and describe data quality/certainty. She showed examples of Open Standards approach housed in Miradi versus how they are described in recovery plans, including goals/objectives setting done for the Washington Coast Salmon Conservation Plan and a viability assessments and threat ratings for Central California coho and steelhead. Points and discussion included:

- Miradi (a desktop software program – for entering data and editing) and MiradiShare (a cloud-based version of Miradi – for displaying and sharing information) are similar but not identical. The hope is to ultimately eliminate the need for the desktop program and move everything to the cloud-based version, but the developers have not done that yet. The desktop program currently encompasses the entire program, while the cloud-based program is not complete but is shareable between multiple people so everyone can work from the same updated information.
- Miradi should be generally understood by everyone, but at varying levels. The people who will be operating it day-to-day need to have a much deeper understanding than others who interface with it when products/information are complete and ready to be discussed.
- Miradi can create big spreadsheets of information, but can also take narrative information. The user assigns values and trends (such as “fair” or “good”), and ratings based on trend data. The user can then specify how coarse or specific the measurement was. Overall, the user decides how simple or complex to make the program.
- There are several recovery plans on the West Coast that have successfully used Miradi for their planning processes: the central California steelhead and coho recovery plans as well as the Washington Coast conservation plan. These were of interest to the Recovery Team and more information on these will be shared at a later date. Also, MiradiShare is free to sign up and the central California coho file is public on MiradiShare for those interested in taking a closer look.
- Miradi creates places to input all the available qualitative and quantitative data, then has other places that summarize the information into easy-to-read formats that can be communicated to policy makers.
- Those who have worked with Miradi before explained that the software developers are receptive to feedback of how to improve the program.

Technical Needs for Watershed Planning

Tristan Peter-Contesse and Jeanette Dorner explained that PSP will be submitting their agency budget request soon to the Governor's office. Their request includes funding for the EDT modeling which would be an important initial step supporting the development of watershed-scale recovery strategies and actions. It is looking like the 2015 legislative session will be tough for budget approvals, but PSP is hopeful that this support for local watersheds will fare well in the legislative process.

The Recovery Team discussed moving forward and what the next steps could look like. Points and discussion included:

- If funding resources are available, the Recovery Team and workgroups could do both the life cycle modeling and the EDT modeling for watersheds. That could provide the technical foundation for how to document priorities, goals, etc. within Open Standards. It is also dependent upon how quickly the Recovery Team completes a draft of the watershed template.
- The Recovery Team discussed whether it makes sense to go forward with Open Standards now, knowing that more funding requests would be needed to continue that work. Overall, the Team agreed that starting with Open Standards for the regional level would be okay without the promise of more funding down the road. They also noted that there needs to be flexibility worked into the program because things will inevitably change throughout the process.
- It was suggested that the Recovery Team focus on 5-9 ecosystem components and 3-5 KEAs for each population, though these may be similar across populations. The Recovery Team noted that they will only be able to do so much within the timeframe, so focusing on a handful of ecosystem components and KEAs will help narrow the conversation to produce results.
- A member suggested that the EDT and life cycle modeling work should be worked on in parallel so that if the results are radically different, the Recovery Team will still have time to make adjustments.
- It was noted that the Hood Canal and Nisqually pilot projects could guide the focus for the EDT and life cycle modeling work.

Open Standards Discussion and Decision

As laid out in NOAA's *Terms of Reference* document, the Recovery Team works by consensus, meaning that every member can at least "live with" the decision. The hope is to achieve consensus to either use or not use Open Standards for the steelhead recovery planning process. The Recovery Team discussed remaining points, including:

- It is important to capture uncertainty where it occurs, even if the answers are unknown. There are other tools that could help answer some of those uncertainties, and should be used in this process if Open Standards is used.
- Some members expressed some skepticism about the tool and how it interprets variable relationships.
- It was agreed that there should be transparent communication about how Open Standards, EDT, and life cycle modeling are being used and how they all contribute to a better steelhead recovery plan. The life cycle modeling piece is already funded through existing NOAA funds, but the other pieces require more budget requests and that is where it becomes important to communicate the value of each piece.

- One member noted that to make this steelhead recovery plan work, it will take input from hundreds of people around the Puget Sound. Open Standards could provide a system to organize and catalogue that information in a digestible way.
- Open Standards can also set up the group to adaptively manage steelhead recovery through the years, unlike the Chinook plan.
- Open Standards has its own “language,” and it would be good to rid communication documents of that language so the policy makers are not confused by having to learn too many new terms.
- One member noted that it would help if the Recovery Team provided guidance on identifying the KEAs to focus on, which could also help the watersheds.

Decision: The Recovery Team agreed to move forward using Open Standards, noting that there are some details to still straighten out.

Letter to Recovery Council Regarding Watershed Guidance

Elizabeth Babcock shared a letter she drafted to the Salmon Recovery Council on behalf of the Recovery Team. At previous Salmon Recovery Council meetings, some watersheds had expressed interest in the steelhead recovery planning process, but were concerned that they may have to wait until the Recovery Team is finished. This letter clarifies what the Recovery Team is doing, timelines associated with the planning process, and a statement about watersheds going ahead on their own if they have the interest and capacity. The Recovery Team discussed the draft, and points included:

- A member noted concern about encouraging watersheds to “not wait for our guidance” because the Recovery Team is still making decisions about overall guidance. It was suggested that this be changed to encouraging watersheds to advance the development of technical information and data needed for recovery planning.
- Another member noted that the letter could encourage watersheds to develop actions and strategies that could serve as the basis for starting to move projects on the ground now.
- One member noted that some watersheds may start on their own, regardless of what the Recovery Team asks or encourages. So there are potential consequences if the Recovery Team says that watersheds can’t go forward. If a few watersheds go forward on their own, the additional work needed would be to incorporate their chapters into the regional chapter, which people have experience with through the Chinook Monitoring & Adaptive Management process.

Decision: It was agreed that the letter will be revised to reflect this conversation, and circulated via email to get approval. In the meantime, Elizabeth Babcock will verbally update the Recovery Council about this at the September 25th Recovery Council meeting.

Workgroup Reports

The Recovery Team has three workgroups, all which updated the Team.

Recovery Goals & Scenarios Workgroup

- The Recovery Team agreed at the August meeting to hire a post doc to do the life cycle modeling, and the workgroup is getting that position advertised. They hope to have the position filled as soon as possible.

- The workgroup considered the hybrid approach discussed by the Recovery Team in August, but decided against it because it would restrict the amount of information they could get.
 - Doing the hybrid approach would reduce the life cycle modeling to one year, which would eliminate the ability to include factors such as land use projections, GIS, and climate change scenarios.
 - In the first year, the post-doc would meet with people in the watersheds to see what existing information they have that could be plugged into the model.
 - The workgroup hopes the Recovery Team can suggest what the situations could look like (i.e., report or data-driven spreadsheet).
- The workgroup will try to have the model running and have a draft of the recovery goals & scenarios section of the Recovery Plan done by the end of 2015, recognizing that they could add more information in 2016.
- It was noted that this workgroup and the Watershed Template Workgroup have some parallel work that could mesh well together.
- PSP asked the Workgroup to attempt to forecast when products will be done so they can update the watersheds and provide advance notice of when specific requests for watershed information will be made.
- The Recovery Team was asked to consider for discussion at future meetings the sort of output format would be most useful for conveying modeling results to watersheds (e.g., workshops, online tool).
- It was noted that the EDT modeling could go quickly if and when the funding becomes available.

Watershed Template Workgroup

- The workgroup met for the first time this month and identified people to fill roles. They also discussed the need for frequent coordination and communication among the workgroups.
- Their overarching goal is to ensure that the watersheds have clear, predictable guidance and a standard to reach.
- They hope to have a draft of their section for the Recovery Plan in early 2016.
- Their next meeting will be in October; they encouraged the Recovery Team members to recruit others who may be interested in participating in this workgroup.
- An issue to discuss at an upcoming workgroup meeting is how much the Open Standards process will include this watershed template or if there is another step needed to have the watersheds move through Open Standards. A member suggested that the Chinook Monitoring & Adaptive Management “toolkit” could serve as a starting point for developing guidance to watersheds on how to utilize Open Standards and the RITT Common Framework for steelhead recovery planning.

Stresses & Pressures Workgroup

- The workgroup met for the first time this month and identified people to fill roles.
- They considered the importance of doing stress/pressure assessments at the DPS/MPG level as well as at the site-specific watershed level. They agreed that they must do the DPS level, but thought it makes sense to include the MPGs in that DPS-level assessment. They agreed that using

generic watershed information could also help, but doing assessments at the site-specific watershed level might need to happen in the future, which would need a different assessment.

- The good news is that there is already existing information about pressures for steelhead, which the workgroup can synthesize for the purposes of the Recovery Team.

Administrative Updates & Questions

Recovery Plan Outline

The outline is being drafted and will be a focus for the next meeting.

Recovery Team Workplan

The workplan for the Recovery Team will continue to be updated as changes are made to the timeline and process. The workgroups' progress will particularly affect the Recovery Team workplan, and there were some changes to Sections 1.5 and 1.6 related to the Stresses & Pressures and Watershed Template Workgroups. Changes to the workplan will be reviewed at every Recovery Team meeting, and updated versions of the document are available on the Google Drive.

The hope is to have someone at every workgroup meeting also take notes, so that others not on the workgroups can follow along. At some point, the Recovery Team meetings may get more focused so not every member has to attend every meeting, but for this first year it is anticipated that every member should make his/her best attempt to attend every Recovery Team meeting.

Travel Reimbursements

As a part of NOAA's appreciation for participating, every non-NOAA employee can get reimbursed for the travel to/from the Recovery Team meetings. Travel reimbursement forms were made available, which will be available at every Recovery Team meeting and are also on the Google Drive. Members should fill out a form for each Recovery Team meeting and submit to Triangle Associates. All Recovery Team meetings are eligible for reimbursement, though not the workgroup meetings, and members can submit reimbursement forms for each meeting starting in June 2014.

Google Drive

Members were reminded that the Google Drive set up for the Recovery Team is useful not only for all the meeting materials but also for relevant background information, such as documents from the TRT, listing decision, etc.

Next Meeting

The Recovery Team agreed to cancel the October 30th meeting due to scheduling conflicts. The next meeting is scheduled for November 14th, which is also a Recovery Council Executive Committee meeting. Elizabeth will check with the Executive Committee to see how long their meeting is scheduled for, and depending upon the number of agenda topics for the Recovery Team, it could be a half-day in the same location as the Executive Committee (PSP's building in Tacoma). If those meetings do conflict, a new Doodle poll will be sent to schedule the next meeting in early November. For now, everyone should hold November 14th for the next Recovery Team meeting in case that works out.

Announcements

- WDFW is co-hosting an informal workshop in Olympia on October 27th on steelhead early marine survival. The workshop will have researchers discuss a variety of topics including acoustic tagging, seal tracking, etc. If interested, contact Joe Anderson so they can anticipate the correct number of attendees.
- Nisqually is celebrating their 25th annual watershed festival the weekend of September 27 & 28, everyone is welcome to come.

Future Meeting Topics

- How does using Open Standards for the DPS/MPG level translate for the watersheds?
- Recovery Plan outline.
- NOAA could bring their sustainable fisheries experts to present on harvest and hatchery work.

The meeting was adjourned at 2:45pm.

Attendees

Participant	Affiliation
Alison Agness	NOAA's National Marine Fisheries Service (NMFS)
Joe Anderson	Washington Department of Fish & Wildlife (WDFW)
Elizabeth Babcock	NMFS
Ned Currence	Nooksack Indian Tribe (<i>phone</i>)
Ken Currens	Northwest Indian Fisheries Commission (NWIFC)
Ed Connor	Seattle City Light
Jeanette Dorner	Puget Sound Partnership (PSP)
Jeff Hard	Northwest Science Center
Steve Leider	NMFS (<i>phone</i>)
Paul McCollum	Port Gamble S'Klallam Tribe (<i>phone</i>)
Randy McIntosh	NMFS
Susan O'Neil	Long Live the Kings
Tristan Peter-Contesse	PSP
Scott Powell	Seattle City Light
David Price	WDFW
Jamie Sanchez	Nisqually Indian Tribe
Kari Stiles	PSP
David Troutt	Nisqually Indian Tribe
Jacques White	Long Live the Kings
Claire Turpel	Triangle Associates
Bob Wheeler	Triangle Associates (<i>phone</i>)